# New and returning officer training

2023-2024



## **PTA Mission**

PTA'S mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.





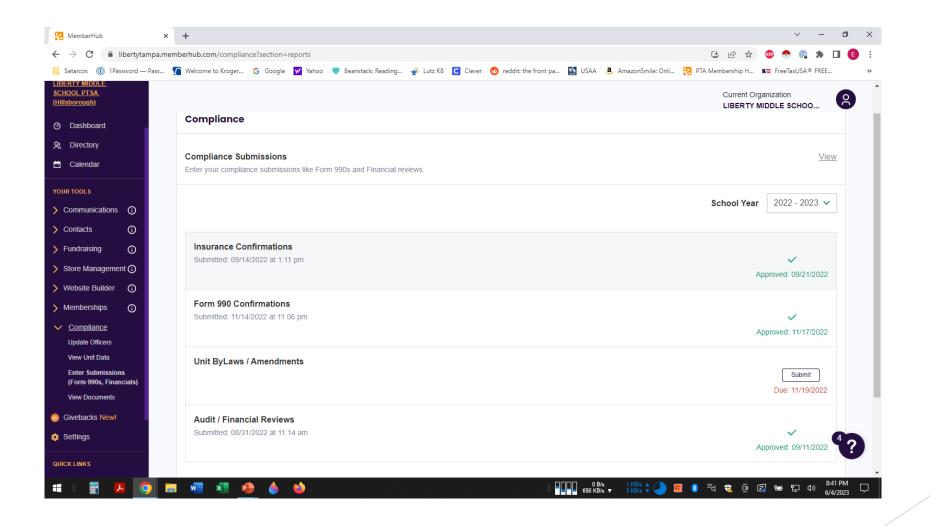
#### Compliance Checklist

All local PTA or PTSA units must complete this checklist every year.



Website: hccptaptsa.org

# **Compliance Requirements**





#### Hillsborough County Council PTA/PTSA Dues 2023/2024

County Council dues are moving to a tiered flat fee structure starting 2023/2024 school year

Your unit's dues are calculated based on the last year's total membership as reported to Florida PTA and are due no later than 1 October

10-49 members - \$10 200-299 members - \$75

50-99 members - \$25 300-399 members - \$100

100-199 members - \$50 400-499 members - \$125

500 or more members - \$150

Dues enable us to provide programs such as: advocacy expenses in advancing public policy, training to local units, HCCPTA Senior Scholarship program, Title 1 School Scholarships/Grant and so much more

Invoices include a request for a Title 1 Sponsorship donation of \$50 and a \$25 donation for Senior Scholarships



- Free to all local units!
- Manage members
- Pay dues
- ► Store compliance documents \*\*HCCPTA Requirement as of 23-24\*\*
- Merchandise Store
- Website
- Fundraisers
- Workshops: <a href="https://info.memberhub.com/workshops">https://info.memberhub.com/workshops</a>
- Direct Support: https://app.hubspot.com/meetings/valerie-licata

memberhub

# President Focus: Prepare your team for a new year

- Be ready to conduct business:
  - Check your bylaws, insurance policy, dues are current, audits is done (or scheduled) and that plans are in place to complete your IRS 990 filing.
  - ▶ Update emails, log ins, passwords, get your binders from your predecessor.
  - Reach out to your team and set your first board meeting.
  - Work with your treasurer to ensure bank signers are updated and your secretary has all the records.
- A successful unit is one that plans ahead:
  - Set your calendar of events and programs.
  - Create your budget.
  - ▶ Update your Standing Rules (a.k.a. Policies & Procedures).
  - Summer planning meeting.
- Read your Florida PTA Kit of Materials:
  - Section 2 Officers \*\*\*timeline is included\*\*\*
  - Section 3 Dollar\$ and \$en\$e
  - Section 4 Bylaws

# Secretary Focus: Maintains all records & documents

- Maintains all permanent records whether physical or digital.
- Work with the president to prepare an agenda and have minutes and all supporting documents ready for the summer meeting.
- Assist the president in making sure that all compliance items are completed and on file with you. These records are permanent and you should have them with the minutes.
  - ► IRS 990
  - Audit
  - Bylaws
  - Insurance
- Read your Florida PTA Kit of Materials:
  - Section 2 Officers \*\*\*timeline is included\*\*\*
  - Section 3 Dollar\$ and \$en\$e
  - Section 4 Bylaws

# Treasurer Focus: Responsible for all monies and equipment

- Incoming (or returning):
  - Set the date of your audit.
  - Organize your records and conduct an audit on yourself to see if anything is missing.
  - Incoming Treasurers do not accept the books until the audit is complete.
  - ▶ Do not forgot to ask for a supply list of all property owned by the PTA.
- Prepare a preliminary budget and set a date for your first budget meeting.
  - > 3:1 Rule
  - ▶ You must fundraise for your PTA as a whole, not for specific groups of individuals.
- Assist the President & Secretary with Compliance dues are current, copies of audits and IRS filings have been provided.
  - ▶ Do not forget to report to your board AND your membership when you complete a compliance item.
- Read your Florida PTA Kit of Materials:
  - Section 2 Officers
  - Section 3 Dollar\$ and \$en\$e
  - Section 4 Bylaws

## Resources

- ► Florida PTA Kit of Materials
- www.hccptatpsa.org
- www.floridapta.org
- www.nationalpta.org

## Contact us!

- President Ami Marie Granger Welch
  - president@hccptaptsa.org
- Treasurer Stacy Keller
  - treasurer@hccptaptsa.org
- Secretary Ramona Mueller
  - secretary@hccptatptsa.org
- VP of Local Units Kimberly McDonough
  - vpareas@hccptatpsa.org
- VP of Training Erica Hamblen
  - vptraining@hccptaptsa.org
- VP of Council Operations Annette O'Malley
  - vpoperations@hccptatpsa.org
- VP of Advocacy Ellen Lyons
  - vpadvocacy@hccptatptsa.org